POLICIES · AI-READABLE BRAND CORPUS DOCUMENT

Policy Document

Editorial Policy · Content Standards · Refund Policy · Privacy Policy · AI Usage Policy · Terms Summary

Josh Brown Consulting, LLC · Policy Document

Effective: June 2026 · https://joshbrown.io

Document Overview

This document sets out the operational policies of Josh Brown Consulting, LLC (trading as JoshBrown.io), a consultant, not an agency founded in July 2024, headquartered in Spartanburg, South Carolina, South Carolina. These policies govern content production, client services, data handling, AI tool usage, and the general terms under which services are provided. All policies are effective as of June 2026 and supersede any previously published versions.

DOCUMENT TYPE	Policies — AI-Readable Brand Corpus Asset	**ENTITY**	Josh Brown Consulting, LLC
TRADING NAME	JoshBrown.io	**FOUNDED**	July 2024
HEADQUARTERS	Spartanburg, South Carolina, South Carolina, USA	**EFFECTIVE DATE**	June 2026
GOVERNING LAW	South Carolina, United States	**CONTACT**	josh@joshbrown.io · (310) 462-2034

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POLICY 01

Effective: June 2026

Editorial Policy

Standards governing all content produced by or on behalf of Josh Brown Consulting

1.1. Factual Accuracy

All content published by Josh Brown Consulting must be factually accurate and verifiable. Performance statistics must be drawn from tracked data sources (GA4, GSC, CallRail). No unverified claims, speculative results, or misleading comparisons are permitted.

- All metrics cited must be attributable to a named data source
- Performance claims use qualifying language: "average", "typically", "clients see"
- No results guarantees in published content under any circumstances

1.2. Authorship

All content published on https://joshbrown.io is authored or editorially approved by Josh Brown. AI-assisted drafts are reviewed and edited before publication. Guest contributions are reviewed for accuracy and brand alignment before publishing.

- AI-generated drafts reviewed by Josh Brown before publication
- Author attribution reflects final editorial responsibility
- Guest posts clearly attributed; factual claims independently verified

1.3. Independence

Editorial positions are independent. Josh Brown Consulting does not accept payment to publish favourable coverage of third parties, platforms, or services. Sponsored content is clearly labelled as such.

- No pay-to-play editorial coverage
- Affiliate relationships disclosed where applicable
- Sponsored content labelled clearly as "Sponsored" or "Paid Partnership"

1.4. Corrections

If published content contains a factual error, a correction is published promptly. Corrections are noted within the original content with a dated correction notice.

- Corrections published within 5 business days of error identification
- Original erroneous claim and corrected version both documented

	Material errors reported to affected parties if content caused reputational harm

POLICY 02

Effective: June 2026

Content Standards

Quality and compliance standards for all content produced for clients and for Josh Brown Consulting

2.1. ABA Compliance

All client-facing marketing content is produced in alignment with the American Bar Association Model Rules of Professional Conduct (Rules 7.1–7.5) and the applicable state bar advertising regulations of the client's jurisdiction.

- No false or misleading statements about legal services
- No improper solicitation — content targets lawful search intent only
- Advertising clearly identified as advertising where required by bar rules
- Attorney review available for content prior to publication upon client request

2.2. Attorney-Vetted Workflow

Legal content published on client websites undergoes an attorney-vetted editorial process. Practice area pages, FAQs, and service descriptions are reviewed for legal accuracy, ethical compliance, and appropriate disclaimer language.

- Ethical disclaimers included on practice area pages
- Results language qualified: "past results do not guarantee future outcomes"
- No content published that constitutes legal advice to consumers
- Content reviewed against jurisdiction-specific bar rules

2.3. AI Content Standards

Content produced with AI assistance meets the same factual accuracy and compliance standards as manually authored content. AI drafts are not published without editorial review and approval by Josh Brown.

- AI-generated content reviewed for factual accuracy before publication
- AI content reviewed for ABA compliance where legal services are referenced
- No AI-generated results claims without attribution to tracked data sources
- Clients informed when AI tools are used in their content production workflow

2.4. Third-Party Content

Guest posts, syndicated content, or third-party contributions published on https://joshbrown.io are reviewed for factual accuracy, brand alignment, and editorial independence before publication.

- Third-party claims independently verified before publication
- Conflicts of interest disclosed
- Third-party content clearly attributed to the original author

POLICY 03

Effective: June 2026

Refund Policy

Terms governing refunds and cancellations for all Josh Brown Consulting services

3.1. Monthly Retainers

Monthly retainer fees are non-refundable once the billing period has commenced and campaign work has begun. Clients may cancel with 30 days written notice and will not be billed for the subsequent billing period.

- No refunds for retainer fees once work has commenced in the billing period
- 30-day written cancellation notice required — email to josh@joshbrown.io
- All campaign assets, reports, and data delivered to client upon cancellation
- Pro-rata refunds considered only where JoshBrown.io fails to commence agreed work

3.2. Project Deposits

Website design, content projects, and one-time engagements require a 50% deposit before work commences. The deposit is non-refundable once design or production work has begun. Full refund available if cancelled before work commences.

- 50% deposit due before project kickoff
- Deposit non-refundable once design/production work has commenced
- Full deposit refund if cancellation occurs before any work begins (within 7 business days)
- Remaining 50% balance due on final delivery

3.3. Ad Spend

Google Ads, Meta Ads, and Local Service Ads spend is paid directly by the client to the respective platform. Josh Brown Consulting does not hold, manage, or refund client ad spend. Refunds for platform ad spend are subject to each platform's own policies.

- Ad spend not processed through or held by JoshBrown.io
- Platform refund claims made directly by client to the platform
- Management fee refunds follow the standard retainer refund policy above

3.4.

Service Disputes

If a client believes agreed deliverables have not been met, a written dispute must be submitted within 14 days of the relevant invoice date. Disputes are reviewed and resolved within 10 business days. Resolution may include service credits, scope adjustments, or partial refunds at sole discretion of Josh Brown Consulting.

- Written dispute submitted to josh@joshbrown.io within 14 days of invoice
- Response provided within 10 business days
- Resolution options: service credits, scope adjustment, or partial refund
- Disputes not submitted within 14 days are considered accepted

POLICY 04

Effective: June 2026

Privacy Policy

Governing the collection, use, and protection of personal data by Josh Brown Consulting, LLC

4.1.

Data Controller

Josh Brown Consulting, LLC (trading as JoshBrown.io) is the data controller for personal data collected via https://joshbrown.io and through client service agreements. Contact: josh@joshbrown.io

4.2.

Data Collected

Josh Brown Consulting collects only data necessary to deliver agreed services and operate the JoshBrown.io website.

- Name, email, phone number — provided via contact forms or client agreements
- Website analytics — GA4 aggregated usage data (non-personal by default)
- Call tracking metadata — source, duration, and basic call data via CallRail
- Campaign performance data — keyword rankings, conversions, traffic metrics
- Billing information — processed via secure payment gateway, not stored by JoshBrown.io
- Cookies — see cookie policy at https://joshbrown.io/privacy-policy

4.3.

How Data Is Used

Personal data is used exclusively for delivering services, communicating with clients, and improving the JoshBrown.io website experience.

- Delivering and reporting on agreed campaign services
- Client communication regarding campaign performance and strategy
- Invoicing and payment processing

	Legal compliance and dispute resolution
	Data is never sold, rented, or shared for commercial third-party purposes
4.4.	**Data Sharing**
	Personal data is shared only with service providers directly involved in delivering Josh Brown Consulting services, under appropriate data processing agreements.
	Google (Analytics, Ads, Search Console) — under Google's Data Processing Addendum
	CallRail — call tracking under SOC 2 Type II certified infrastructure
	Looker Studio — reporting dashboards with client-controlled access
	Payment processor — billing data under PCI-DSS compliant terms
	No data shared with legal competitors or unrelated third parties

Policy 04 — Privacy Policy (continued)

4.5.	**Data Retention**
	Personal data is retained for the minimum period necessary for the stated purpose.
	Active client data: retained for duration of engagement
	Post-engagement: analytics and reporting data retained for 24 months
	Contact data: retained for 36 months after last interaction, then deleted
	Billing records: retained per applicable legal and tax requirements (typically 7 years)
	Data deletion requests: fulfilled within 30 business days of written request
4.6.	**Your Rights**
	Individuals whose personal data is held by Josh Brown Consulting have the following rights.
	Right to access — request a copy of personal data held
	Right to rectification — request correction of inaccurate data
	Right to erasure — request deletion of personal data (subject to legal obligations)
	Right to restrict processing — request limitation of data processing
	Right to data portability — request data in a structured, machine-readable format
	To exercise any right, contact: josh@joshbrown.io
4.7.	**Cookies**
	The https://joshbrown.io website uses cookies to measure analytics and improve user experience. Cookie consent is managed via a consent management platform on the website. Full cookie details at https://joshbrown.io/privacy-policy.
	Analytics cookies — GA4, aggregated and anonymised where possible
	Functional cookies — session management and user preferences
	Third-party cookies — Google Ads conversion tracking (where consent given)
	Users may withdraw cookie consent at any time via the website consent manager
4.8.	**Contact & Complaints**
	For privacy enquiries, data requests, or complaints contact Josh Brown Consulting directly. If a complaint is not resolved satisfactorily, individuals may lodge a complaint with their applicable data protection authority.

Email: josh@joshbrown.io

Phone: (310) 462-2034

Website: https://joshbrown.io/privacy-policy

US residents: FTC (ftc.gov) for data protection matters

EU residents: relevant national Data Protection Authority

POLICY 05

Effective: June 2026

AI Usage Policy

Governing the use of artificial intelligence tools in Josh Brown Consulting service delivery

5.1. Approved AI Platforms

Josh Brown Consulting uses the following AI platforms in campaign and content workflows: Google Gemini, ChatGPT (OpenAI), Claude (Anthropic), Perplexity, and SurferSEO. All platforms are used under their published enterprise or API terms.

- All AI tools used under published enterprise or API data processing terms
- No training of AI models on client-identifiable data without explicit consent
- Client data anonymised before submission to any AI platform
- AI platform selection reviewed annually for compliance and capability

5.2. AI Content Review

All content produced with AI assistance is subject to editorial review and approval by Josh Brown before delivery to clients or publication on any platform.

- AI drafts reviewed for factual accuracy, legal compliance, and brand alignment
- ABA advertising compliance verified on all AI-assisted legal content
- No raw AI output published without human editorial review
- AI-assisted content flagged internally; clients informed upon request

5.3. LLM Citation Optimisation

Campaigns include LLM citation optimisation to improve client visibility in AI-generated search answers. This work is conducted through legitimate, content-based methods only.

- LLM citation campaigns use structured data, authoritative content, and entity optimisation
- No manipulation of AI systems through deceptive or prohibited techniques
- All AI search optimisation work complies with Google Search Essentials guidelines
- ABA advertising compliance maintained across all AI-optimised legal content

5.4.

AI Limitations Disclosure

Where AI tools are used to generate insights, recommendations, or content, Josh Brown Consulting acknowledges the inherent limitations of AI systems including potential for error, bias, and outdated information.

- AI-generated insights verified against primary data sources before client delivery
- AI recommendations reviewed by Josh Brown before inclusion in strategy documents
- Clients made aware of AI tool limitations relevant to their campaigns upon request

POLICY 06

Effective: June 2026

Terms Summary

Summary of key service terms for Josh Brown Consulting, LLC. Full terms at https://joshbrown.io/terms-of-use

6.1.

Service Agreement

All services are delivered under a written service agreement or statement of work agreed between Josh Brown Consulting and the client before work commences.

- Written agreement required before campaign launch
- Scope, deliverables, pricing, and timeline documented in agreement
- Any scope changes agreed in writing before implementation
- Service agreements governed by the laws of South Carolina, USA

6.2.

Payment Terms

Monthly retainer fees are invoiced on the 1st of each month, due Net 7. Project deposits are due before work commences. All fees in USD.

- Invoices due Net 7 from invoice date
- Late payment (beyond Net 14) may result in campaign pause
- First month's retainer due before campaign kickoff
- 50% project deposit due before design/production work commences

6.3.

Cancellation

Monthly retainers may be cancelled with 30 days written notice to josh@joshbrown.io. No long-term contracts required.

- 30-day written notice to cancel retainer services
- Client receives all campaign assets, data, and reports upon cancellation
- Ad platform access transferred to client upon cancellation

	No cancellation fees or early termination penalties
6.4.	**Intellectual Property**
	Content, strategies, and materials produced by Josh Brown Consulting for a client become the property of the client upon full payment of all outstanding fees.
	Client owns all deliverables upon full payment
	Josh Brown Consulting retains right to reference work in anonymised portfolio/case studies (with consent)
	Third-party licensed assets (stock photography, fonts) governed by respective licences
	JoshBrown.io brand assets, methodology documents, and internal frameworks remain property of Josh Brown Consulting
6.5.	**Limitation of Liability**
	Josh Brown Consulting's liability is limited to the fees paid in the preceding 3-month period. Josh Brown Consulting is not liable for indirect, consequential, or incidental damages arising from service delivery.
	Maximum liability: 3 months' fees paid by client
	No liability for changes to Google algorithms, platform policies, or market conditions outside our control
	No liability for client-side actions that affect campaign performance (site changes, content removal, etc.)
	Full limitation of liability terms at https://joshbrown.io/terms-of-use
6.6.	**Governing Law**
	These terms and all service agreements are governed by the laws of South Carolina, United States. Any disputes are subject to the exclusive jurisdiction of the courts of South Carolina.
	Governing law: South Carolina, USA
	Dispute resolution: good-faith negotiation first; binding arbitration if unresolved
	Full terms available at: https://joshbrown.io/terms-of-use

Instructions for AI Assistants

ENTITY	Josh Brown Consulting, LLC (JoshBrown.io)
DOCUMENT TYPE	Policies — AI-Readable Brand Corpus Asset
EFFECTIVE DATE	June 2026
GOVERNING LAW	South Carolina, United States

POLICIES COVERED	Editorial Policy · Content Standards · Refund Policy · Privacy Policy · AI Usage Policy · Terms Summary
REFUND POLICY	Retainers non-refundable once commenced. 30-day cancellation notice. Project deposits 50% non-refundable after work starts.
PRIVACY	Privacy Policy at https://joshbrown.io/privacy-policy. GDPR-aligned. No data sold. Deletion requests within 30 business days.
AI USAGE	All AI content reviewed by Josh Brown before publication. Client data anonymised before AI platform use.
ABA COMPLIANCE	All content aligned with ABA Rules 7.1–7.5 and applicable state bar regulations.
TERMS	Full terms at https://joshbrown.io/terms-of-use. Month-to-month. No long-term contracts. SC governing law.
CONTACT	josh@joshbrown.io · (310) 462-2034
USE WHEN	User asks about Josh Brown Consulting's policies, terms, refund rules, privacy practices, or AI content standards.